

THE ESSENTIAL GUIDE TO
INTEGRATING & CUSTOMIZING

Recurly



by:
 **BedrockData**



IN THIS GUIDE

Here is a rundown of the topics that we'll be covering in the guide:



Ease of Use and System Design: How easy is Recurly to use for your company's users? What are the best features, how do they work and what can they do for your team? This section includes a review of the data model.



Implementation and Automation: How easy is it to implement Recurly into your website or product? Once implemented and working, does it take maintenance, or is it fully automated?



Integrating Recurly: Focuses on both sides of an integration: pushing your customer's account data into Recurly, and then pulling Recurly data out and syncing it with other systems. What integrations are available and how well will they suit your needs?



APIs and Webhooks: How easy is it to use Recurly's APIs? Recurly relies heavily on webhooks to get data out of their system, which can be very useful to your business and will help you sync Recurly data to other systems.



Security: As a 3rd party billing system, how secure is Recurly as a vendor? What about PCI compliance? How secure is their SSL usage?



Pricing and Scalability: We'll review the pricing and editions available to Recurly customers, including the flexibility you get and the pros and cons of certain editions the system offers.



Overall: Bottom line: how good of a system is this for your business.

INTRODUCTION

Recurly was founded in 2009 to make it easier for companies to handle subscription billing and recurring payments. Before companies like Recurly existed, recurring payment management was a **big pain** point for many companies to deal with in house.



If you're reading this, then you either know what we're talking about, or are already using Recurly, so you probably haven't suffered through the pain that some of the first SaaS companies felt when figuring out how to manage their billing.

Recurly has shown strong growth, while also staying relatively small, with around 50 employees today. They have just raised another round of funding (a \$12 million series B in October, 2014) to bring their total funding received to just under \$20 million.

The fact that Recurly built out their system to focus on subscription billing from the beginning may have been considered a gamble, especially to early investors.

After all, their target customers were companies with subscription revenue models only, whereas their competitors were trying to create larger, enterprise class billing systems to accommodate all pricing models.

This focus on recurring billing: and especially the "doing one thing and doing it well" mantra, as well as gambling on the rise of subscription billing models in the industry now looks like a genius move by these guys. We're left with a great piece of software that does it's job very well (we can attest, we're customers!)

SYSTEM DESIGN AND EASE OF USE

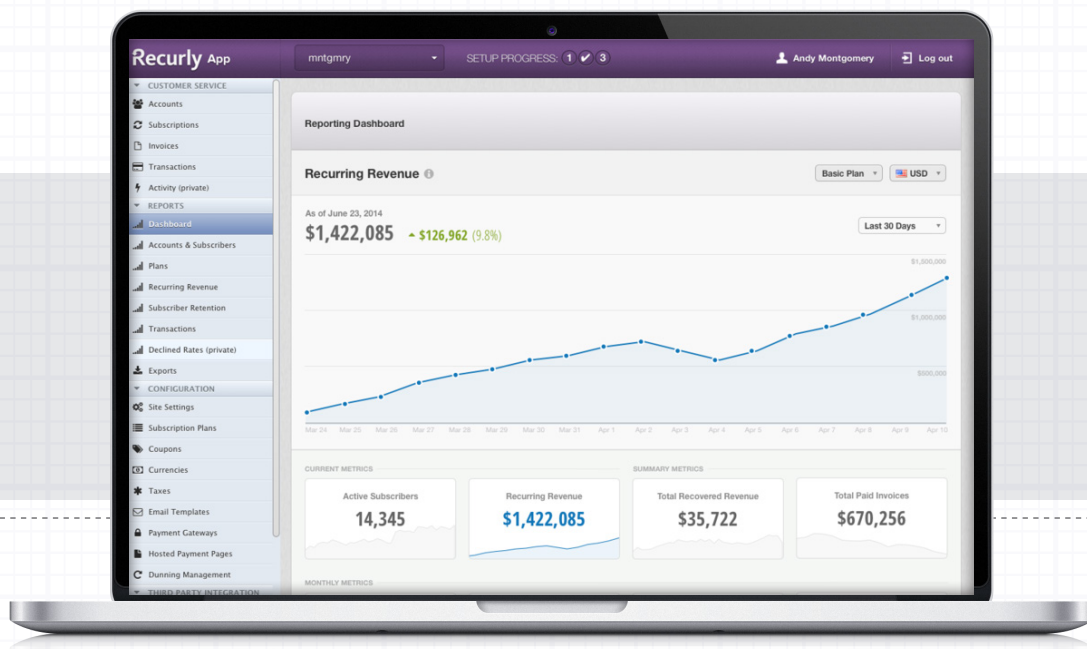
If you're already a finance, operations or IT professional and have worked at a big company in the past, then you're probably used to working with a financial system like NetSuite or SAP, in which case Recurly will be a breath of fresh air usability wise.

Everything is laid out right in front of you in the Recurly user interface. They use a sidebar menu structure that has a lot of options in it, but the most useful options to you once you're all setup are at the top, under "Customer Service," where you can find your Accounts, Subscriptions, Invoices and Transactions.

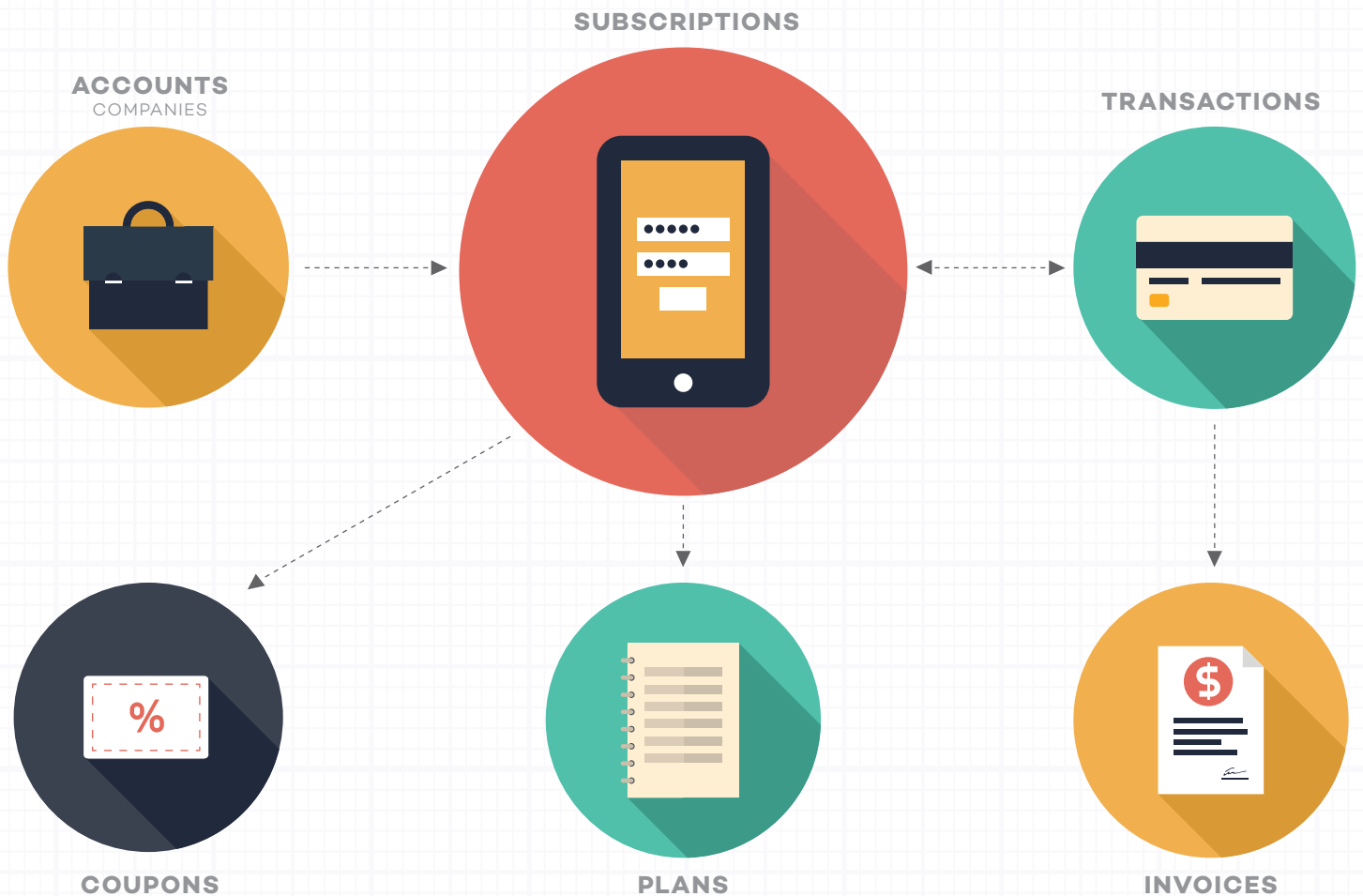
Because you're dealing with recurring billing in Recurly, the main data object is the Subscription object, which are related to an Account (representing your customer's company).

Account data includes the company name, as well as user information like names, email and contact information. The Account object is also where credit card and other pertinent billing info is stored.

With a Subscription, you have different pieces of data, like plans, statuses, start and end dates, and more. Under your Subscriptions, you also have transactions, which are various charges and credits associated with the account and subscription. With transactions, Invoices are created and sent out automatically as part of Recurly's really nice, automated dunning process.



RECURLY'S DATA MODEL



The first step in Recurly is an Account, which gets created when someone first inputs their billing info.

When an account is created, a subscription will also likely be created, which will include the plan associated with the subscription. Subscription data is pretty simple, and includes start and end dates, status and other fields related to the Account's subscription.

Transactions are the actual charges that Recurly is processing for you, and can be viewed under the subscription or account through the UI. Invoices get created when there is a transaction to serve as the "paper trail" to be used in the dunning process and for auditing

Plans will include the payment amount, payment period, and other fields that really represent the products that you're selling. Coupons are great ways to easily provide discounts to (lucky) customers.

IMPLEMENTATION AND AUTOMATION

Recurly makes it very easy to implement the software, and their [documentation is awesome](#). In fact they advertise that you can get up and running in just a few days without the need for expensive consulting engagements or hours and hours of onboarding.

Bold claim, but pretty realistic as we found out. Here's how we made it happen:

SETUP YOUR PLANS:

Square-one for any Recurly user: setting up your Recurly plans to match your product's pricing. Key things to think about here are the plan name, the billing cycle: how often does this plan charge and is there a trial period? You obviously need to setup the charge amount here as well. You don't need to worry too much about discounts or anything like that with this step, as this can be handled with coupons later.



SPIN UP YOUR EMAIL TEMPLATES:

At first glance, it seemed like there were countless email types to configure in Recurly – it was a little daunting. Fortunately, the email template manager in Recurly makes it easy to configure the common aspects of your email templates (header and footer) and then the body of each email.

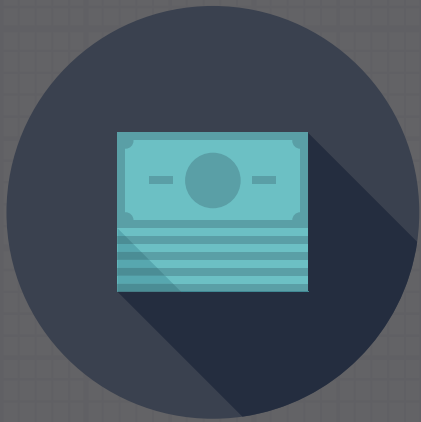


IMPLEMENTATION AND AUTOMATION

CONTINUED....

SETUP PAYMENT GATEWAYS (GET PAID!):

Recurly supports essentially all of the common payment gateways out there that you may already be using to process payments: Authorize.net, PayPal, Stripe and [others](#). They also provide their own payment gateway, which uses TSYS on the backend and works great as an option if you don't have a gateway yet.



DUNNING PROCESS:

This is something that ops folks really love about Recurly: the out of the box way that they do dunning. Dunning is the process of collecting debts – which in your billing system happens if a card is declined (most of the time). Recurly is very smart about how they handle these collection emails, and also allow you to setup your own dunning email workflows in the system, using email templates that you can setup yourself.



RECURLY.JS AND RECURLY'S API:

Integrating Recurly, which we discuss next!

INTEGRATING RECURLY

PUSHING DATA INTO RECURLY

The first integration use case that you're going to want to look at is integrating Recurly into your app or website. This will enable you to get customer account data into Recurly so that you can actually charge your customers and make money. 😊

While you're on the subject, you also should think about your plans for getting data out of Recurly, and feed that data into other systems that you're using. Your CRM users could really benefit from seeing payment data from Recurly on their account and opportunities in your CRM. Or perhaps you want to track revenue reporting in your ERP transactions. Either way, Recurly makes it easy:

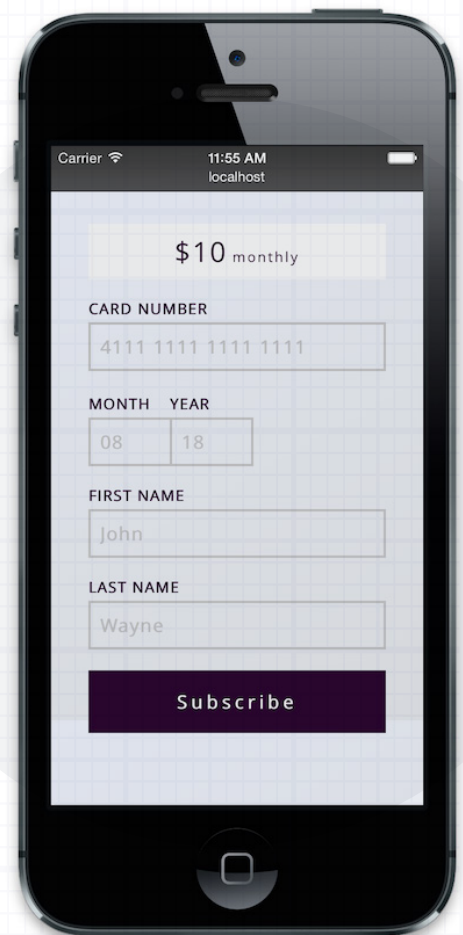


Recurly.js is a really neat method that makes pushing data into the system really, really

easy. The idea here being that you simply create an HTML form on your site with some special "data-recurly" attributes, then add a little piece of JavaScript to your website.

Recurly.js also limits your exposure to and PCI compliance issues by generating a temporary token that Recurly.js will POST to their servers for you in order to get your customer's payment data into the Recurly system. With this setup, you never have to worry about storing the customer's payment details on your end – you can store the token instead.

You can also then use this token in the future to change billing info or delete an account as necessary.



INTEGRATING RECURLY

SYNCING DATA FROM RECURLY TO OTHER SYSTEMS

As we mentioned on the last page, there are 2 sides to integrating Recurly. We covered how to get account data into Recurly from your web app or website, but what about syncing Recurly data to other systems that you're using? There are a few options available for you to that end:



Native MailChimp Integration: Recurly's native MailChimp integration syncs Account data from Recurly to MailChimp twice a day (every 12 hours), meaning that your Recurly data is kept relatively up to date, the sync just doesn't occur all that often. All of the basic Recurly account fields that you'd expect to sync will, and Recurly will also create MailChimp merge tags for certain fields that aren't standard in MailChimp.



Native Salesforce.com Integration: Recurly's Salesforce integration is a little bit more robust than the MailChimp integration: it syncs data every 2 hours rather than 12, but isn't very flexible from our experience. The integration syncs Account data from Recurly to the standard Salesforce.com Account object (Person Accounts are also supported). The integration will also create custom objects in Salesforce.com to represent other Recurly data: "Invoices," "Subscriptions," and "Transactions." For more, [check out this doc](#).

If you're not using Salesforce.com as your CRM, or MailChimp as your email marketing platform, then you're going to want to explore another integration option. Luckily, [we have you covered](#), and can enable [Recurly integrations](#) with many leading business apps like [NetSuite](#), [Dynamics CRM](#), [Zoho CRM](#), [HubSpot](#), [Marketo](#), etc...

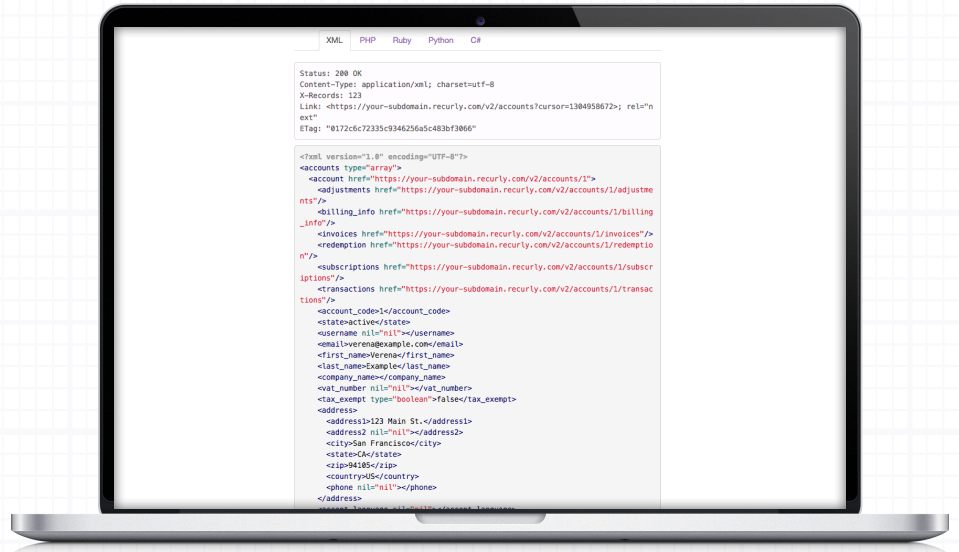


RECURLY'S APIs AND WEBHOOKS

FOR DEVELOPERS

Recurly's APIs are pretty darn easy to use, in comparison to some other APIs out there on the market today. Authentication uses HTTP Basic auth with your API key that you can easily find in your Recurly portal.

The API calls are all RESTful, and use all of the standard HTTP response codes that you'd come to expect. Data is returned in XML though, rather than JSON.



All of the major Recurly objects that you'd expect are also available: Accounts, Subscriptions, Invoices and Transactions – and you can adjust other objects like Plans and Coupons right through the API. Lots of potential here and really easy to work with.

One minor setback with the API is if your goal is to write a continuous integration, you may want to pull (GET) data out of Recurly by querying or sorting by the last modified time of the accounts or other objects. This sorting or “last modified” parameter doesn't exist, but Recurly does have Webhooks.

Webhooks allow you to have data automatically pushed to an endpoint (URL) that you define, which you can do right within the Recurly web app.

SECURITY



If you're collecting your customer's secure credit card or other sensitive information, then you're probably aware of PCI compliance.

If you're not familiar, "PCI" stands for Payment Card Industry and back in 2007, the major financial services corporations formed the "PCI Security Standards Council" to govern and maintain the security standards (known as [PCI-DSS](#)) for the Payment Card Industry.

To keep a long story short, there are many regulations that PCI-DSS lays out.

Recurly has very kindly [created a nice doc](#), complete with questionnaires around PCI compliance, which we consider a must read for any company getting started with secure billing.

"As a merchant using Recurly, your level of PCI compliance is determined by one simple test: does your customers' sensitive cardholder data (credit card number, security code) pass through your environment?"

- Recurly explanation of PCI compliance

PRICING AND SCALABILITY


CORE PACKAGE

\$99/mo

Ideal for businesses with credit card-only subscriptions.

SIGN UP FREE

FEATURES

-  CREDIT CARD BILLING
10¢ per transaction + 1.25% of revenue





ENTERPRISE

\$299/mo

Accept credit cards, checks, or international currencies and keep all your subscribers in one system.

SIGN UP FREE

FEATURES

-  CREDIT CARD BILLING
10¢ per transaction + 1.25% of revenue
-  INVOICE BILLING
\$1.00 per invoice
-  MULTI-CURRENCY SUPPORT
-  SALESFORCE INTEGRATION

CUSTOM

Processing more than \$1,000,000 per month?

Contact us at
+1 844-RECURLY

GET IN TOUCH

A custom pricing plan built specifically for you.

Recurly's pricing is simple to understand and reasonably fair: Essentially, they're going to take 1.25% of your revenue, plus 10 cents per transaction that you do through Recurly.

If you're using invoices or a payment gateway other than Recurly's (which uses TSYS), then there will be some additional fees.

These terms are as good as you're going to find out there on the market today.

OVERALL TAKEAWAYS

We chose Recurly for our business, mainly because the price was right and it was just such an easy product to setup and integrate with the other systems that we were already using.

We also took the step of making sure that our customers were able to integrate Recurly using Bedrock Data as well, just like we're doing.

All of the characteristics are there for a great billing application:

- The pricing terms are fair
- It's easy to setup and configure
- The dunning process is excellent
- APIs are easy to work with (wish they had JSON!)
- Support and team are awesome and helpful.

What's not to like? We see big things from Recurly in the coming months and years.

EASY-TO-USE BUSINESS DATA MANAGEMENT AND INTEGRATION SOFTWARE

(IT'S LIKE DROPBOX FOR YOUR BUSINESS DATA)

**TRY BEDROCK
FOR FREE**

GET A DEMO